

Retention of Construction Project Records Issued by the Office of Construction

UDOT 08B-25

Effective: 03-07-65

Revised: 01-12-96

Purpose

To establish the policy and to place responsibility for orderly and proper processing of final project records for retention.

Policy

The Department's Project Engineer will set up and maintain a file for each assigned project until that project is complete. All project records will then be sent to Central Files.

Procedures

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UDOT 08B-21.1

Responsibility: Resident/Project Engineer

Actions

1. Upon assignment to project, immediately sets up filing system by obtaining cardboard transfer boxes, set of manila folders, and expandable file pockets.
2. Keeps project records current and complete as project progresses.
3. Upon completion of project, places all project records including field books, final plans, tickets and final estimates into transfer boxes, and submits same with Final Estimate. (If any project records are retained they should be submitted as soon as the Final Estimate is paid.)
4. Delivers transfer boxes to Region Construction Engineer with Form C197, Final Estimate Checklist.

Responsibility: Region Reviewer

5. Reviews Final Estimate and supporting records to the extent necessary to insure its accuracy and completeness.
6. Transport final estimate documents to Contracts, Estimates & Agreements Manager. Transport remaining project records to Central Files Records Supervisor.

Responsibility: Contracts, Estimates and Agreements Manager

7. Signifies approval in writing and retains records with the original to the Construction Section last.
8. Processes Final Estimate for payment and forwards records to Central Files Records Supervisor after the Final Estimate has been paid.
9. Holds records when claim is submitted pending settlement of claim. Returns records after claim is settled.

Responsibility: Resident/Project Engineer

10. Upon notification that Final Estimate is approved for payment, delivers any records not forwarded with the Final Estimate to Central Files Records Supervisor.